

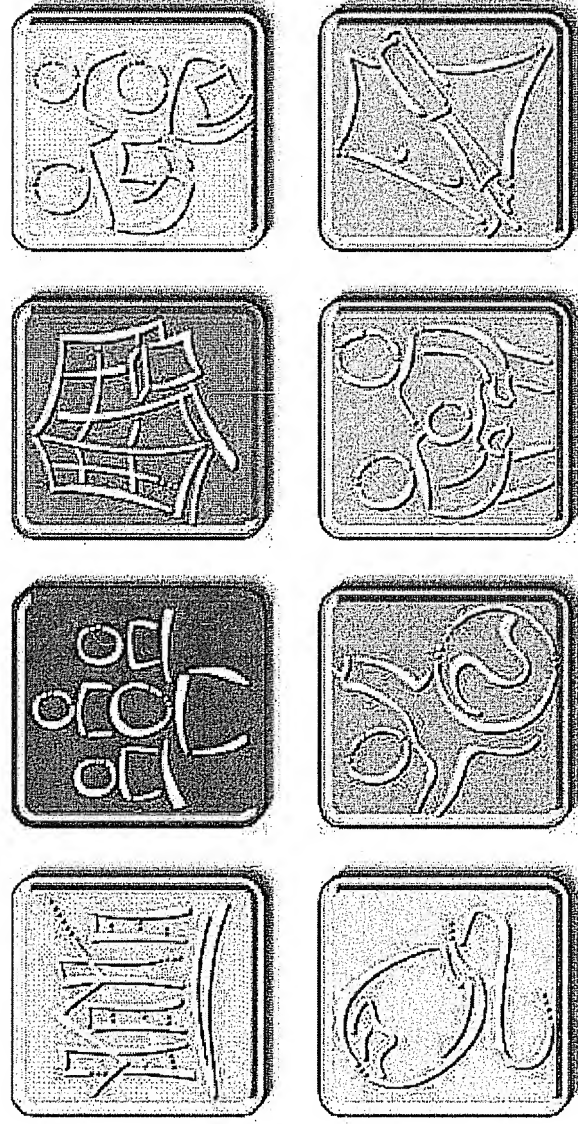
**METHOD AND SYSTEM FOR  
DEVELOPING TEACHING AND  
LEADERSHIP CHARACTERISTICS AND  
SKILLS**

**U.S. Patent Application Serial No.  
10/016,905**

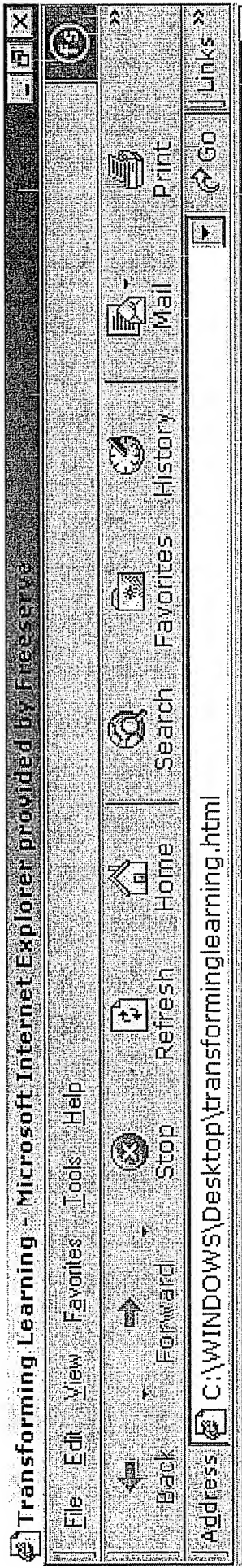
**Filed December 14, 2001**

**Attorney Docket No. D4701-00198**

**Exhibit J**



# TRANSFORMING LEARNING

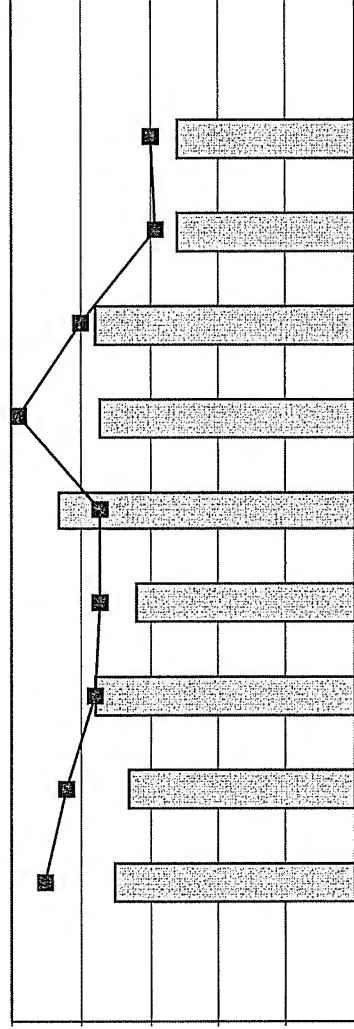


## Your Views on Student Perceptions

Your view: how you think students would like to feel in your class in the **FUTURE**, compared with how you think it feels for them **NOW**.

### Key:

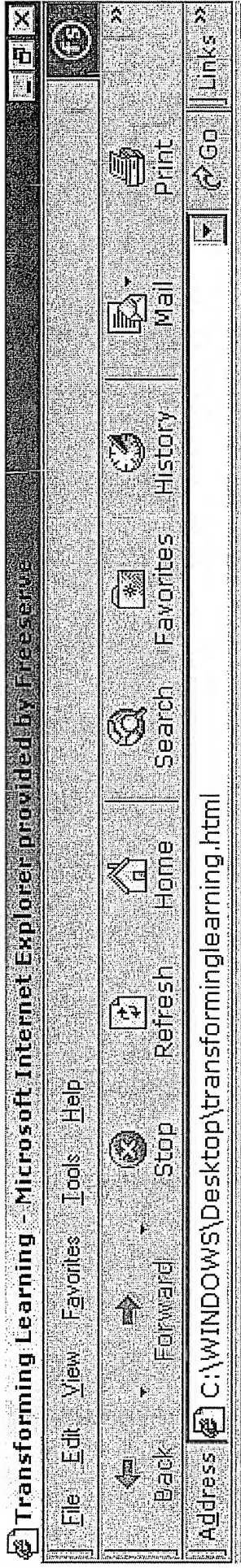
- ☐ How you think it feels to be a student in your class **NOW**
- ◆— How you think students would like it to feel in the **FUTURE**



### Results:

- ☐ What do you think students are most satisfied with?
- ☐ Where do you think they feel there scope for improvement?
- ☐ Do you think students feel there is too much emphasis on certain dimensions?
- ☐ What have you seen so far?





## STRENGTHS:

You feel that your students are satisfied with the following dimensions:

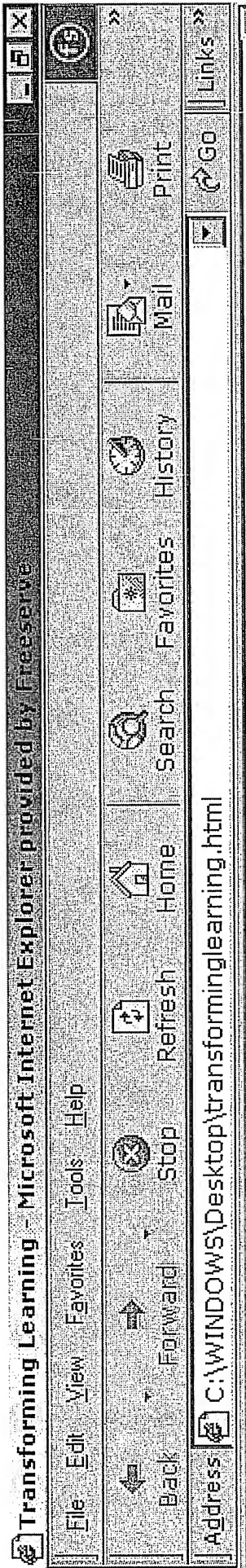
*Click on each dimension to see a definition of that dimension.*

*Dimensions are rank ordered (with the smallest gap between ideal and current first).*

**STANDARDS**  
**SAFETY**  
**INTEREST**  
**ENVIRONMENT**  
**FAIRNESS**  
**PARTICIPATION**  
**ORDER**







# STRENGTHS:

You feel that your students are satisfied with the following dimensions

*Click on each dimension*

*Dimensions are*

**STANDARDS:** the extent to which students understand what is expected from them in terms of performance and effort; and whether they are encouraged to improve their performance.

**STANDARD**

**SAFETY**

**INTEREST**

**ENVIRONMENT**

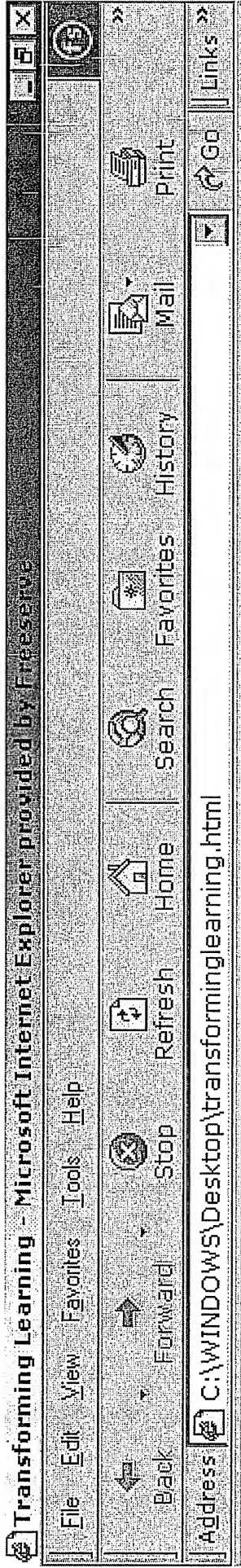
**FAIRNESS**

**PARTICIPATION**

**ORDER**

OK





## SCOPE FOR IMPROVEMENT:

You believe that students would *most* like the following dimensions to be different from the way they currently feel them to be:

*Click on each dimension to see a definition of that dimension.*

*Dimensions are rank ordered (largest gap between current and ideal first).*

**SUPPORT**  
**CLARITY**

### Context Setting:

Class that went well...

Class that went less well...

It may help you to think about the following questions in relation to the dimensions above:

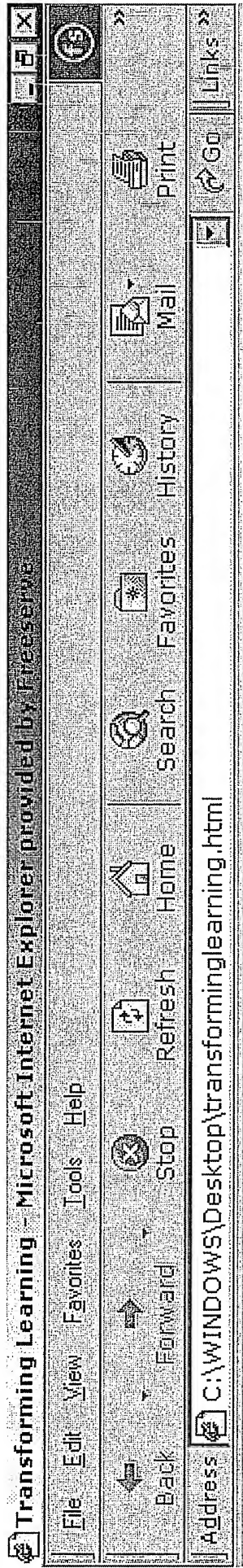
What is it about the above dimension(s) that made you feel that there was a discrepancy between your students' current perceptions and their aspirations?

How do these results compare to your comments collected in the context setting exercise (see box above right)?

Have your views of your classroom climate changed since you completed the questions?

Are circumstances different in anyway?





## SCOPE FOR IMPROVEMENT:

You believe  
dimension  
Click on ea  
Dimension

**SUPPORT:** the extent to which students feel emotionally supported in the classroom, both by their teacher and by one another, such that they are willing to try new things and learn from their mistakes.

**SUPPORT  
CLARITY**

OK

### Context Setting:

Class that went well...

Class that went less well...

It may help you to think about the following questions in relation to the dimension(s) above:

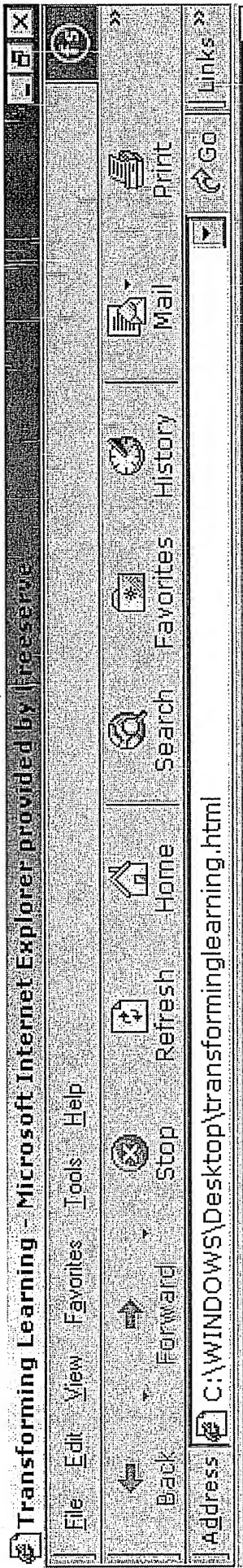
What is it about the above dimension(s) that made you feel that there was a discrepancy between your students current perceptions and their aspirations?

How do these results compare to your comments collected in the context setting exercise (see box top right)?

Have your views of your classroom climate changed since you completed the questions?

Are circumstances different in anyway?





## SCOPE FOR IMPROVEMENT:

You believe  
dimension(s)  
Click on each  
Dimensions

**CLARITY:** the extent to which students are clear about the aims and objectives of the course; how well they understand the purpose of each lesson and what is expected of them in their homework; and how each lesson relates to the broader subject.

**SUPPORT  
CLARITY**

OK

### Context Setting:

Class that went well...

Class that went less well...

It may help you to think about the following questions in relation to the dimension(s) above:

What is it about the above dimension(s) that made you feel that there was a discrepancy between your students current perceptions and their aspirations?

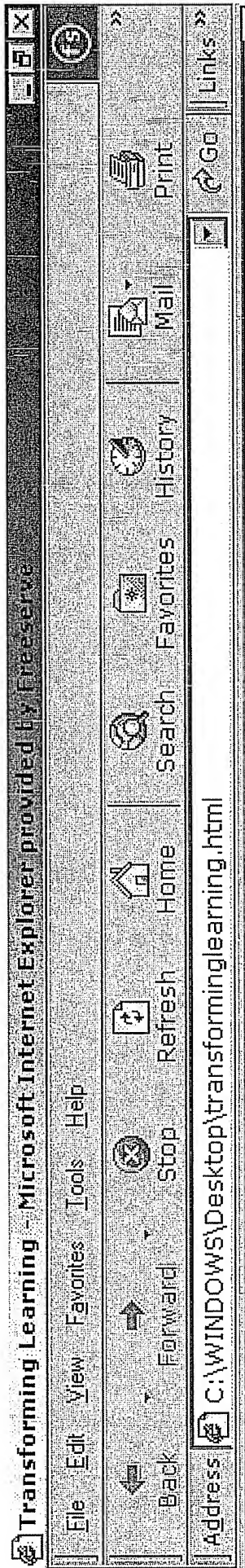
How do these results compare to your comments collected in the context setting exercise (see below)?

Have your views of your classroom climate changed since you completed the questions?

Are circumstances different in anyway?





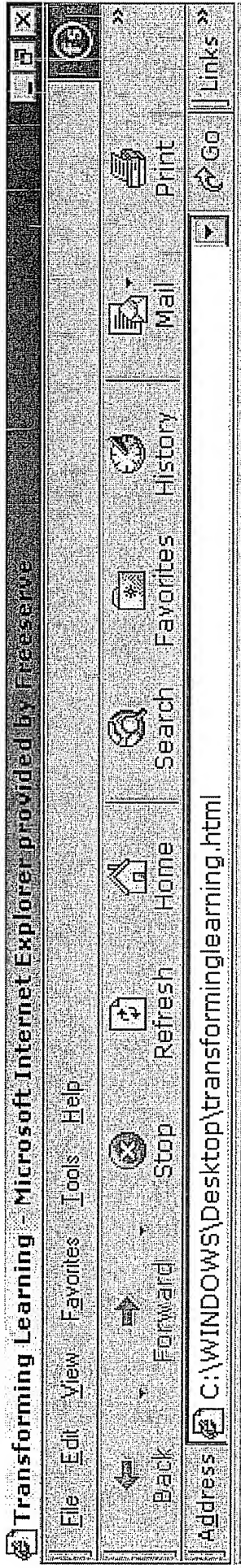


## TOO MUCH EMPHASIS:

You don't feel that your students perceive too much emphasis on any of the dimensions in the current climate.

You believe their aspirations are either level with the current climate or higher, as discussed in previous sections.





## WHAT HAVE YOU SEEN SO FAR?

This section of the feedback process has given you insight into your **own** thoughts on how students feel in your classroom, based on your responses to the questionnaire.

### This data has highlighted:

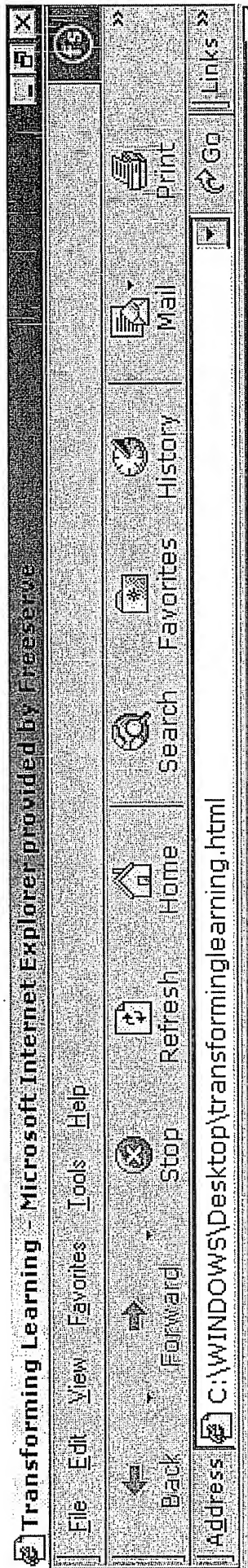
- The relationship between how you think students feel now and how you think they would like to experience the climate in your classroom in the future.
- The dimensions where you feel students' aspirations are highest or lowest for the future.

You have also seen how this data compares with the insights you had as you thought through specific classroom examples in the context setting exercise above.

### Your Reactions:

What insights might you now gain from the views of your students?



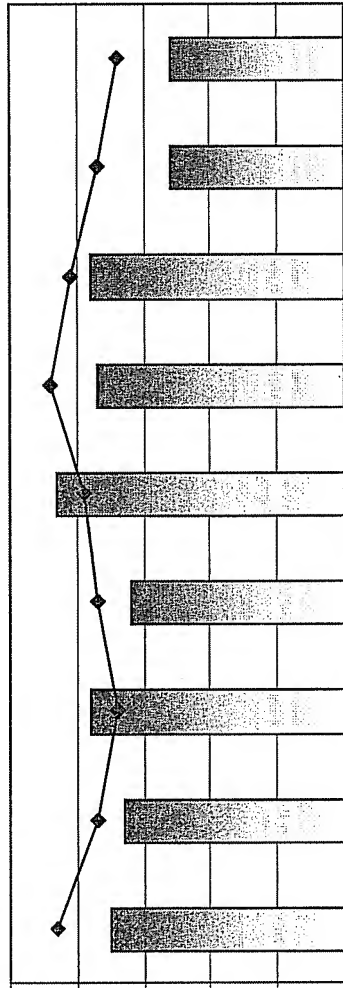


## How Students Actually Feel





Students' view: how students would like your class to feel in the **FUTURE**, compared with how it actually feels **NOW**.

Key:

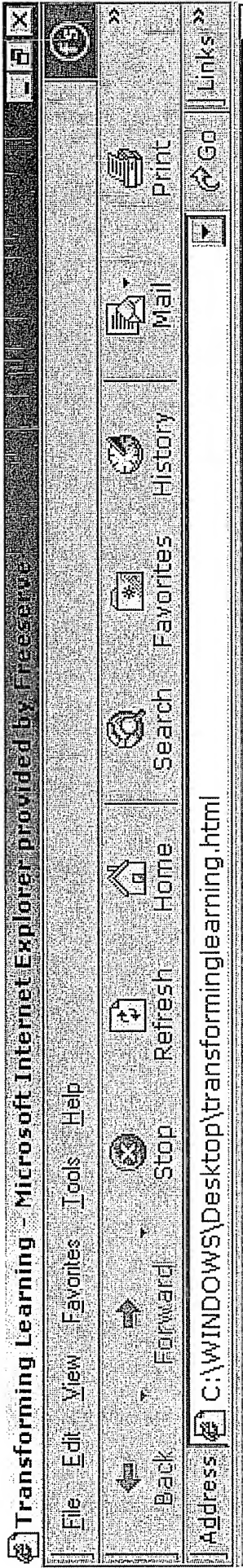
-  How it feels to be a student in your class **NOW**
-  How students would like it to feel in the **FUTURE**



### Results:

-  What are students most satisfied with?
-  Where is there scope for improvement?
-  Do students feel there is too much emphasis on certain dimensions?
-  What have you seen so far?





## STRENGTHS:

Students' responses indicate that they are happy with the levels of the following dimensions:

*Click on each dimension to see a definition of that dimension.*

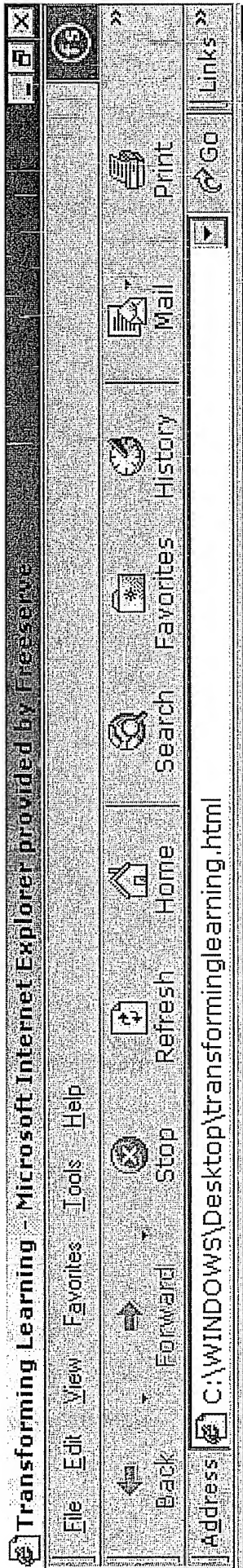
*Dimensions are rank (smallest gap between current and ideal first).*

- ☐ PARTICIPATION
- ☐ STANDARDS
- ☐ SAFETY
- ☐ ORDER
- ☐ FAIRNESS

Think about the above dimensions where your students' view is close to their aspirations. Click the button next to the dimension above to call up a box in which to jot down your thoughts on some reflective questions which will help you to focus on taking the next steps.







## STRENGTHS:

Students' responses indicate levels of the following dimensions. Click on each dimension to view responses.

Dimensions are ranked (s)

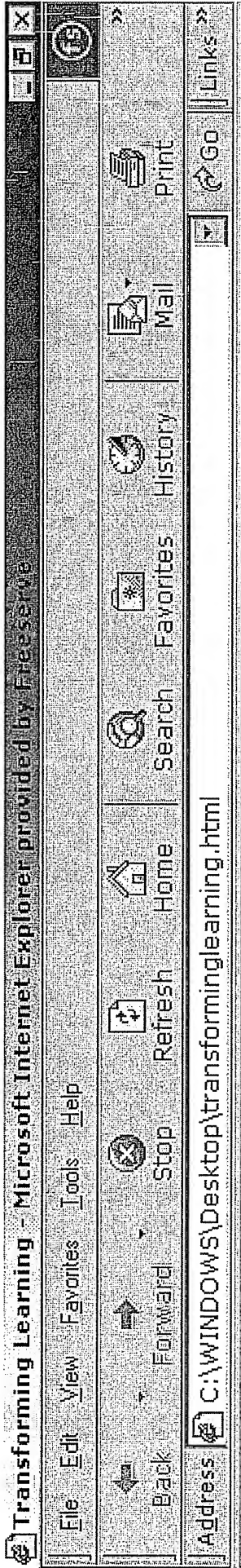
- ☐ PARTICIPATION
- ☐ STANDARDS
- ☐ SAFETY
- ☐ ORDER
- ☐ FAIRNESS

Think about the above dimension(s) where your students' view is close to their aspirations. Click the circle next to the dimension name above to call up a box in which to and jot down your thoughts on some reflective questions which will help you to focus on taking the next steps.

**PARTICIPATION:** The extent to which pupils feel able to question or offer opinions in class, the opportunity they have to present to the class, and the degree to which they work together in groups.

OK





## STRENGTHS:

Students' responses indicate that they are happy with the levels of the following dimension(s):

Click on each dimension to see a definition of that dimension.

Dimensions are:

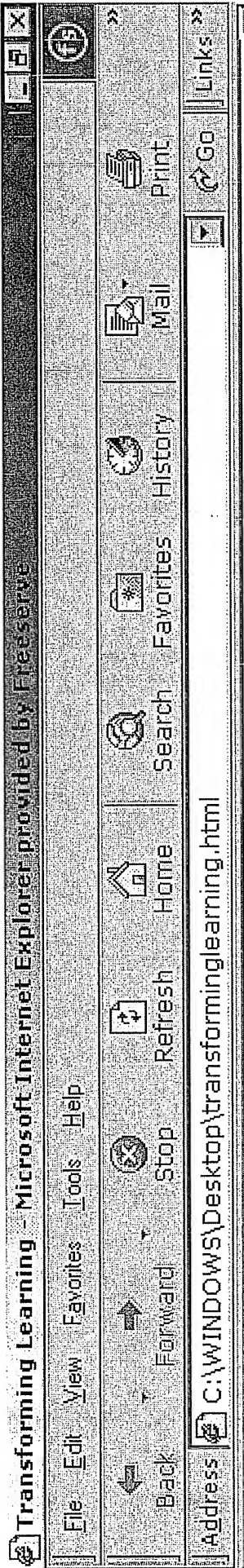
- ☐ PARTICIPATION
- ☐ STANDARDS
- ☐ SAFETY
- ☐ ORDER
- ☐ FAIRNESS

**FAIRNESS:** The extent to which there is a perceived absence of favouritism and a clear and consistent link between rewards and recognition in the classroom and students' actual performance.

OK

Think about the above dimension(s) where your students' view is close to their aspirations. Click the circle next to the dimension name above to call up a box in which to and jot down your thoughts on some reflective questions which will help you to focus on taking the next steps.





## STRENGTHS:

### FAIRNESS:

Students' response levels of the following

Click on each dimension.

Dimensions are

**PARTICIPATION**  
**STANDARDS**  
**SAFETY**  
**ORDER**  
**FAIRNESS**

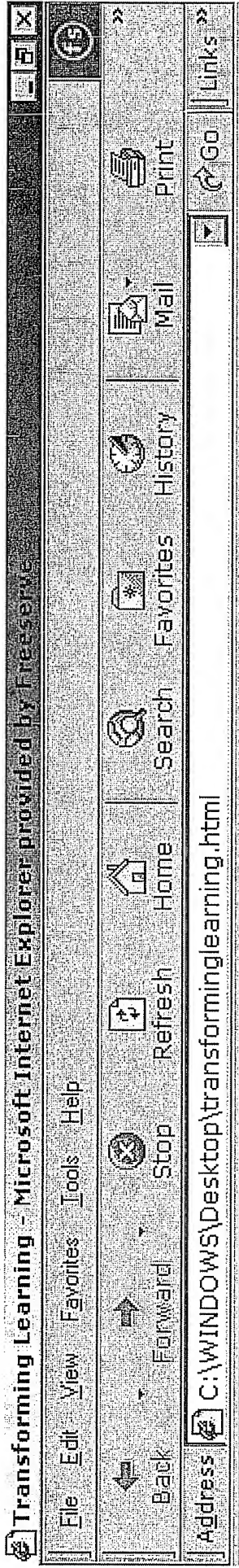
Think about the view is close to the dimension name above to call up a box in which to and jot down your thoughts on some reflective questions which will help you to focus on taking the next steps.

What are your thoughts on your students' response to this dimension? What do you think about their aspirations?

Think about what you have done to contribute to their satisfaction with the climate.

OK





## SCOPE FOR IMPROVEMENT:

Students' responses indicate that there is most scope for improvement in the following dimensions and they are giving you a real mandate to make changes:

*(Click on each dimension to see a definition of that dimension.)*

*Dimensions are rank ordered by size of gap, from large to small.*



**INTEREST**  
**CLARITY**

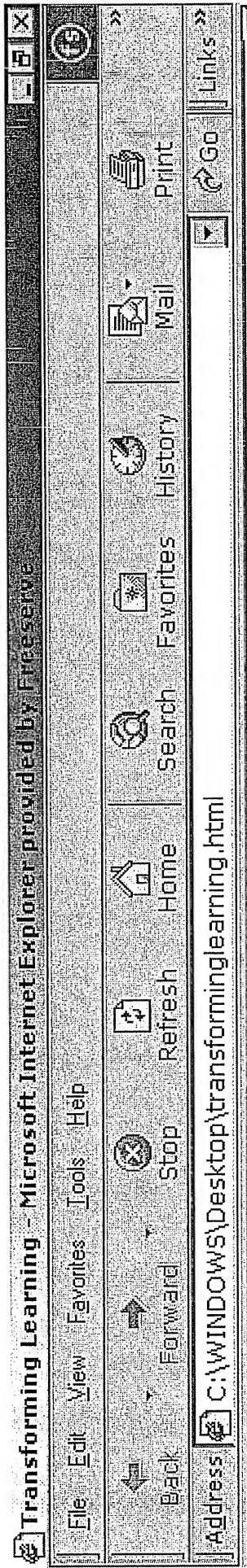
Think about the areas where students would like to see most improvement:

Click the circle next to the dimension name above to call up a box in which to and jot down your thoughts on some reflective questions which will help you to focus on taking the next steps.

Your context setting text will be available - is there anything in your comments that throws light on the above? Are there any learning opportunities presenting themselves from the comparison of the class which went well to the one which went less well?







## SCOPE FOR IMPROVEMENT:

Students' responses indicate that there is most scope for improvement in the following dimension(s) and they are giving you a real mandate to really make improvements.

**INTEREST:** The extent to which students feel the classroom is an interesting and exciting place to be, where students feel stimulated to learn.

Dimensions are rated from 1 (not at all) to 5 (very much).

☐ INTEREST

☐ CLARITY

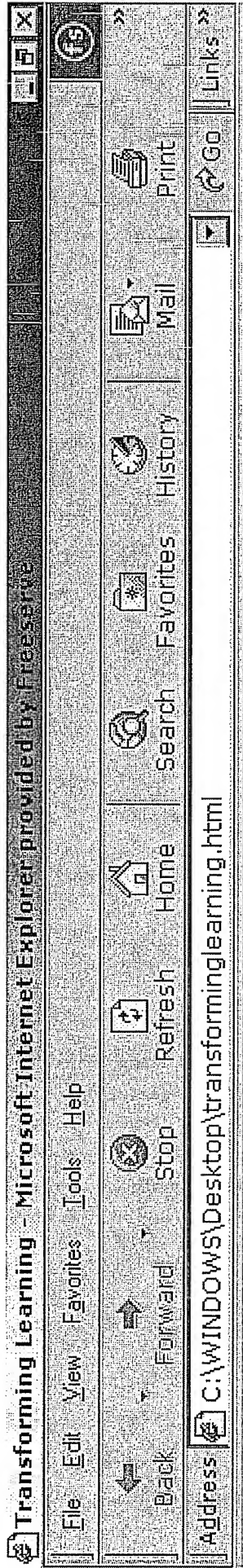
OK

Think about the areas where students would like to see most improvement:

Click the circle next to the dimension name above to call up a box in which to and jot down your thoughts on some reflective questions which will help you to focus on taking the next steps.

Your context setting text will be available - is there anything in your comments that throws light on the above? Are there any learning opportunities presenting themselves from the comparison of the class which went well to the one which went less well?





## SCOPE FOR IMPROVEMENT:

Students' responses indicate that there is most scope for

**CLARITY:** The extent to which students are clear about the aims and objectives of the course; how well they understand the purpose of each lesson and what is expected of them in their homework; and how each lesson relates to the broader subject.

- ☐ INTEREST
- ☐ CLARITY

OK

Think about the areas where students would like to see most improvement:

Click the circle next to the dimension name above to call up a box in which to and jot down your thoughts on some reflective questions which will help you to focus on taking the next steps.

Your context setting text will be available - is there anything in your comments that throws light on the above? Are there any learning opportunities presenting themselves from the comparison of the class which went well to the one which went less well?



## SCOPE FOR IMPROVEMENT:

Students' responses indicate that there is most scope for improvement in the following dimension(s) and they are giving you a real mandate to really make improvements: (Click on each dimension to see a definition of that dimension)

Dimensions are rank ordered by size of gap, from large to small.

INTEREST  
CLARITY

### INTEREST:

What are your thoughts on your students' response? Where students have high aspirations, what might be the reasons for the discrepancy to their current perceptions.

What do you feel may have impacted upon their aspirations of how things should be in your class both within the class and within the school?

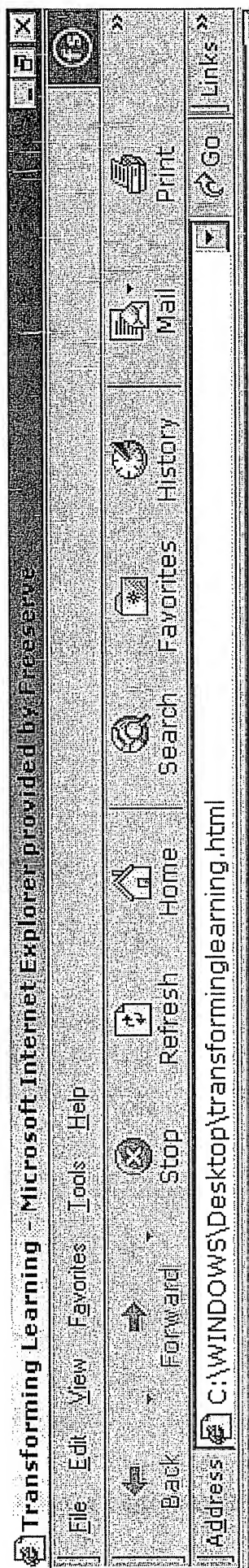
OK

### Context Setting:

Class that went well...

Class that went less well...

: to you to s nting hich



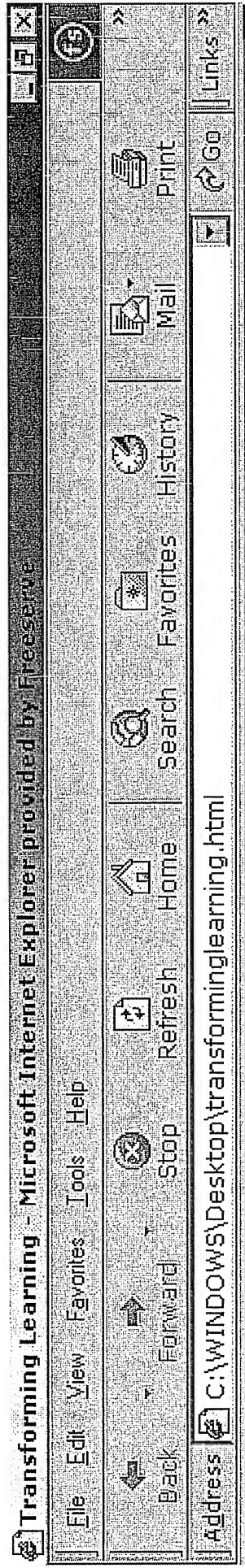
## TOO MUCH EMPHASIS:

Your students do not feel that there is too much emphasis on any of the dimensions in the current climate.

Their aspirations are either level with the current climate or higher, as discussed above.







## WHAT HAVE YOU SEEN SO FAR?

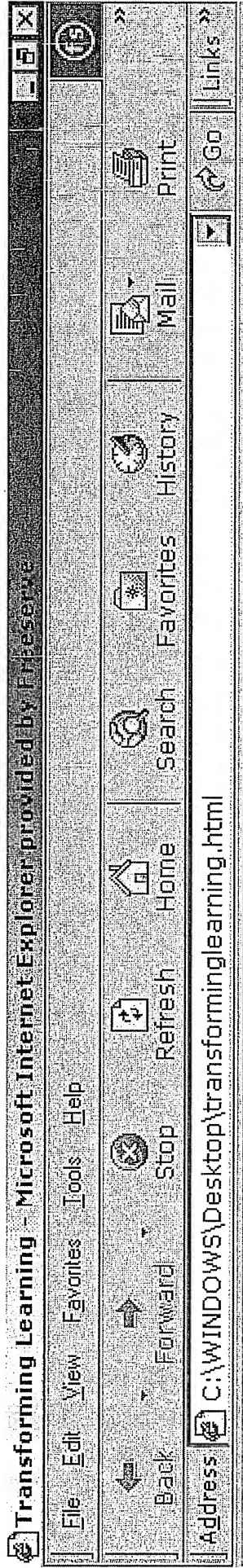
This section of the feedback has given you valuable information on how your **students** feel now and their aspirations for the future.

**The data has highlighted the dimensions where:**

- Students are satisfied with the climate in your classroom.
- There is a difference between how students feel now and their aspirations for the future.

You have also had the opportunity to compare this data with the insights you had as you thought through specific classroom examples in the earlier exercise. Your thoughts about the context and implications have also been gathered to provide insight to the next stages of the process.

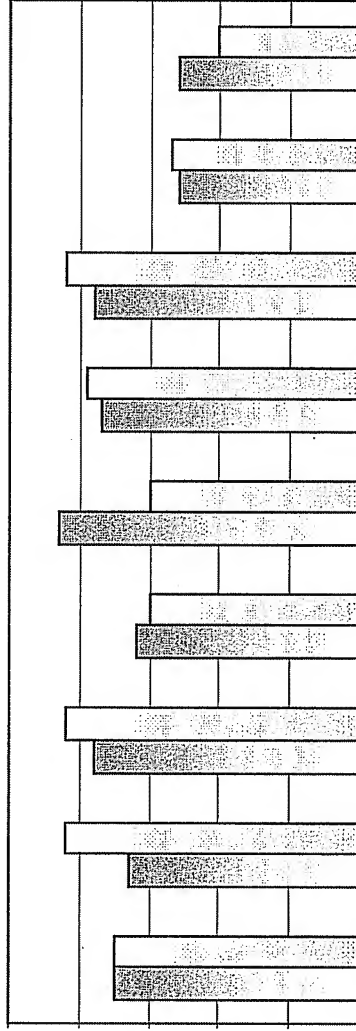




# Comparing Your Own Views With Students'

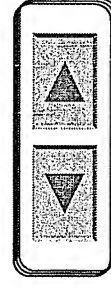
How do you think students currently experience the climate in class compared with your views?

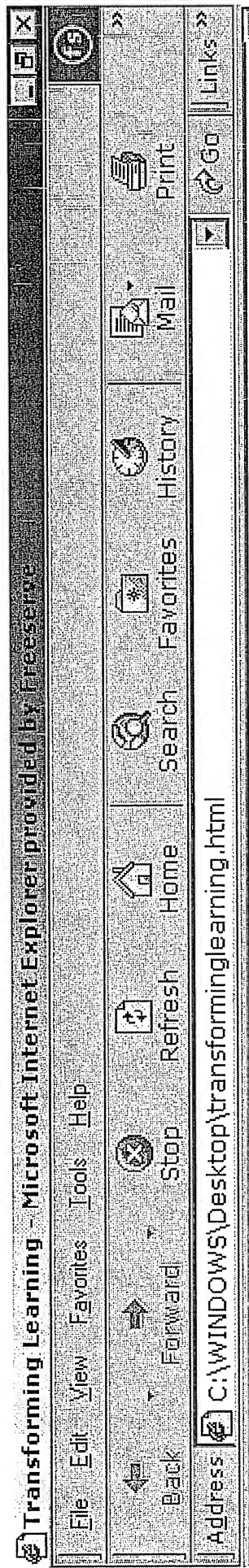
- Key:
- ☐ How students think the climate in class feels now
  - ☐ How you think it feels for students in your class now



## Results:

- ☐ Brief Summary
- ☐ Your most accurate perceptions...
- ☐ Your areas for improvement...
- ☐ What have you seen so far?





## A BRIEF SUMMARY:

### Looking at the overall picture...

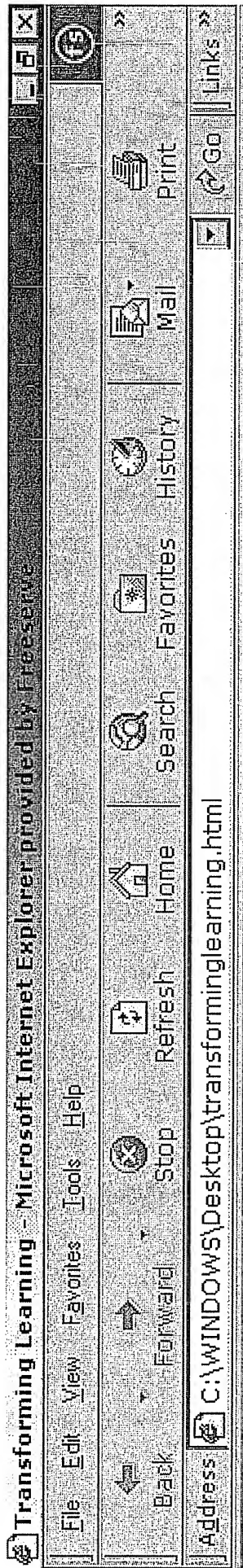
You are generally adept at understanding how your students feel in your classroom.

How does this compare with what you might have expected? Click the button on the right to refer to your comments in the context setting exercise you completed before starting your feedback. Do the results reflect your comments?

Now look in more detail at the dimensions. Are there areas where you are more or less in tune with your class than others? What might be behind these results?

### CONTEXT





## A BRIEF SUMMARY:

### Looking at the overall picture...

You are doing really well and are already generally adept at understanding how your students feel in your classroom.

How does this compare with what you might have expected? Click on the button on the right to refer to your comments in the context section. Do the exercise you completed before starting your feedback. Do the results reflect your comments?

Now look in more detail at the dimensions. Are there areas where you are more or less in tune with your class than others? What might be behind these results?

### Context Setting:

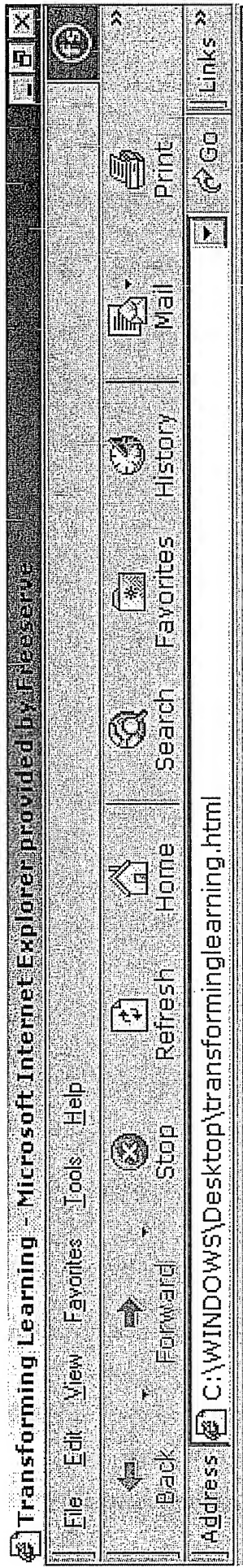
Class that went well...

Class that went less well...

OK







## MOST ACCURATE PERCEPTIONS:

Your understanding of how it feels to be a student in your classroom was particularly accurate on the following dimensions:

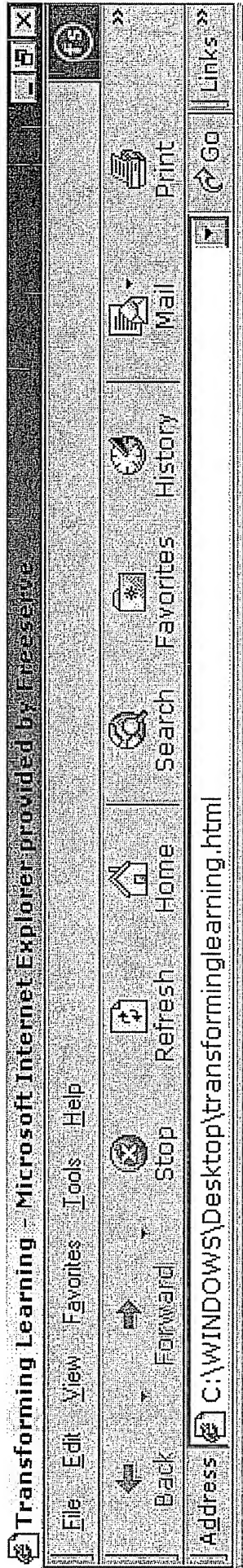
*Click on each dimension to see a definition of that dimension.*

*Dimensions are rank ordered (smallest gap between your views and students' views first)*

- ☐ **CLARITY**
- ☐ **INTEREST**
- ☐ **FAIRNESS**
- ☐ **SUPPORT**
- ☐ **STANDARDS**
- ☐ **SAFETY**

Think about the above dimensions where your view is closest to that of your students. Click the button next to the dimension name above to call up a box in which to jot down your thoughts on some reflective questions which will help you to focus some of the things you are currently doing which allows you to understand how your students feel.





## CLARITY:

The extent to which students are clear about the aims and objectives of the course; how well they understand the purpose of each lesson and what is expected of them in their homework; and how each lesson relates to the broader subject.

### CLARITY:

What are your thoughts on your students' response to this dimension?

Think about what you have done to contribute to their satisfaction?

Do your comments from the context setting exercise throw any light on the above results.

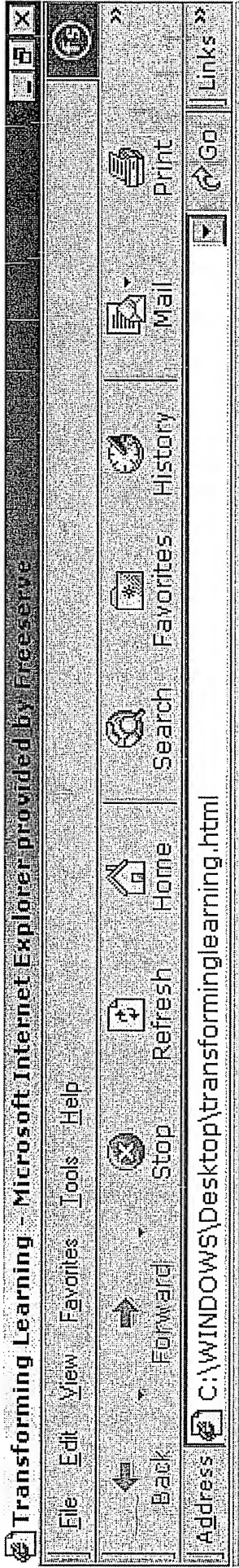
**CLARITY** – Text comments already created from previous charts:

### Context Setting:

Class that went well...

Class that went less well...





## SCOPE FOR IMPROVEMENT:

In 1 out of the 9 dimensions, you have a much more **positive** view of your students' experience: *(Click on each dimension to see a definition of that dimension)*

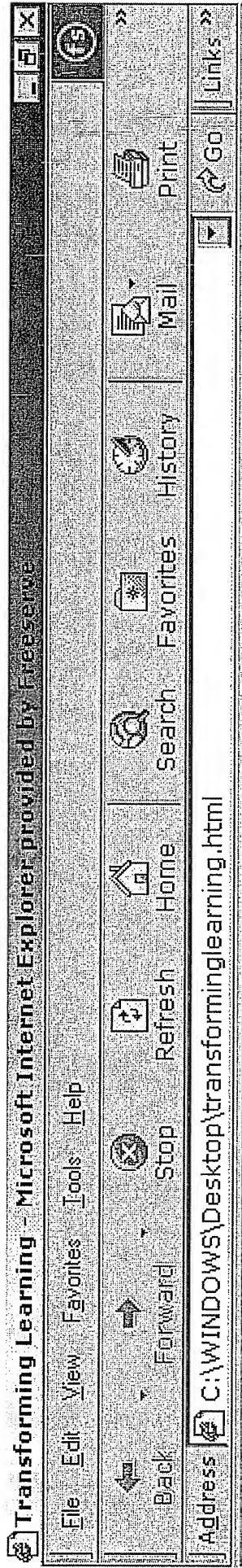
### ORDER

In 1 out of the 9 dimensions, you have a much more **negative** view of your students experience: *(Click on each dimension to see a definition of that dimension)*

### PARTICIPATION

Click on any of the above to record your initial reactions and to start drafting some actions you might take to build on your strength in that particular dimension. Your comments will be available throughout the feedback process for modification as necessary.





## ORDER:

The extent to which discipline, order, punctuality and civilised behaviour are maintained within the class.

### ORDER:

What are your thoughts about why your perceptions might differ from those of your pupils?

What might you be able to do to gain insights into how students feel about this issue?

### Context Setting:

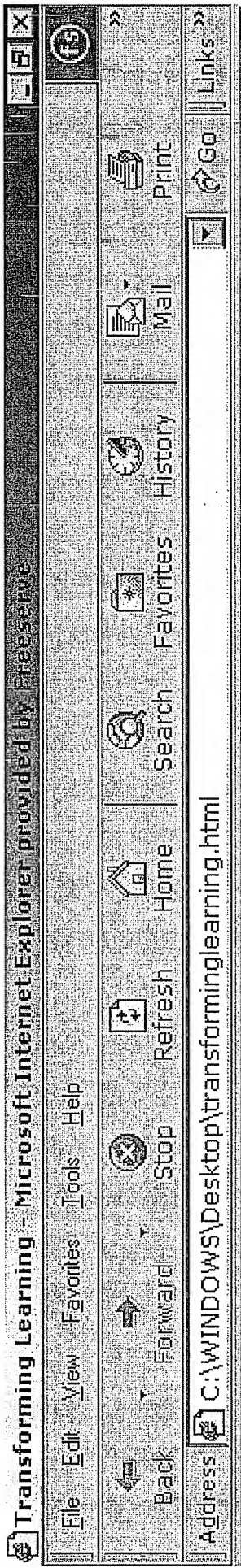
Class that went well...

Class that went less well...

**ORDER** – Text comments already created from previous charts:







## WHAT HAVE YOU SEEN SO FAR?

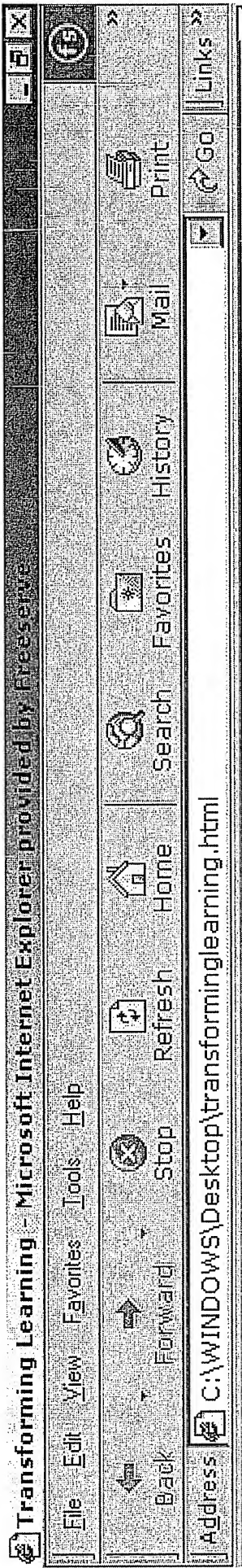
This section of the feedback has given you an insight into your own thoughts about how students feel in your classroom compared with their views on how it feels.

### **This data has highlighted:**

- How in tune you are with your students' views overall.
- How in tune you are with your students' views in specific climate dimensions.

You have also had the opportunity to compare this data with the insights you had as you thought through specific classroom examples in the earlier exercise. Your thoughts about the context, implications and actionable next steps have also been gathered to provide insight to the next stages of the process.





## Comparing to the National Average

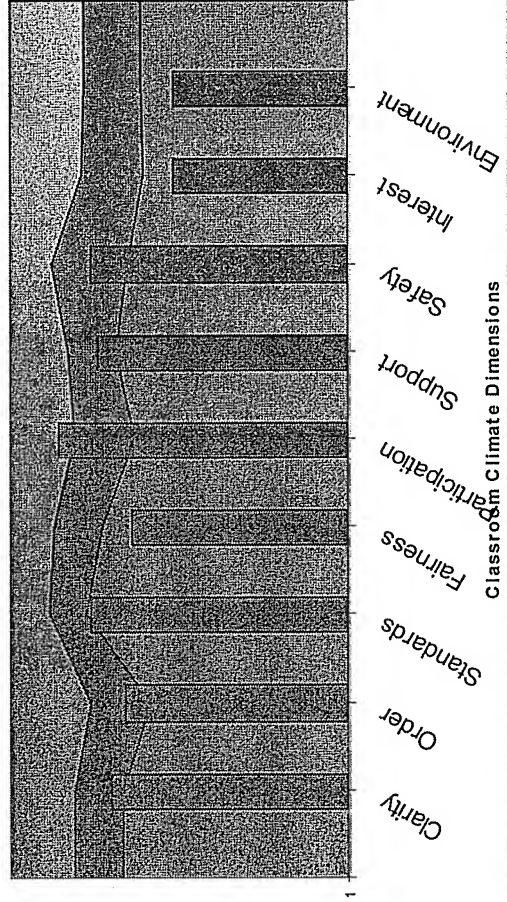
Your students' view of the current climate in your classroom, compared with the views of other students in England and Wales about their climate.

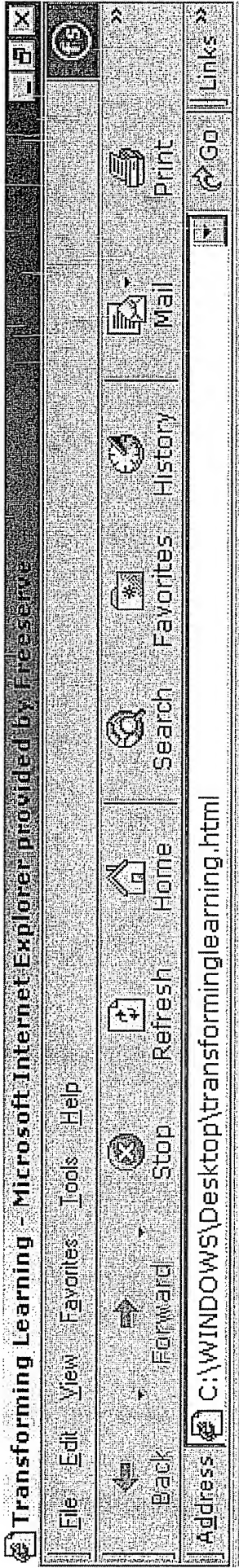
### Key:

- ☐ How it feels to be a student in your class NOW.
- ☐ The views of students in those classrooms whose climate is better than typical in England and Wales.
- ☐ The range of views typically found in English and Welsh classrooms.
- ☐ The views of students in those classrooms whose climate is lower than is typical in England and Wales.

### Results:

- ☐ Where is your classroom climate higher than is typical?
- ☐ Where is your classroom climate lower than is typical?
- ☐ What have you seen so far?





## STRENGTHS:

Your students' responses indicate that the climate in your class, on 1 of the 9 dimensions, is higher than that typically experienced by other students in England and Wales:

### **PARTICIPATION**

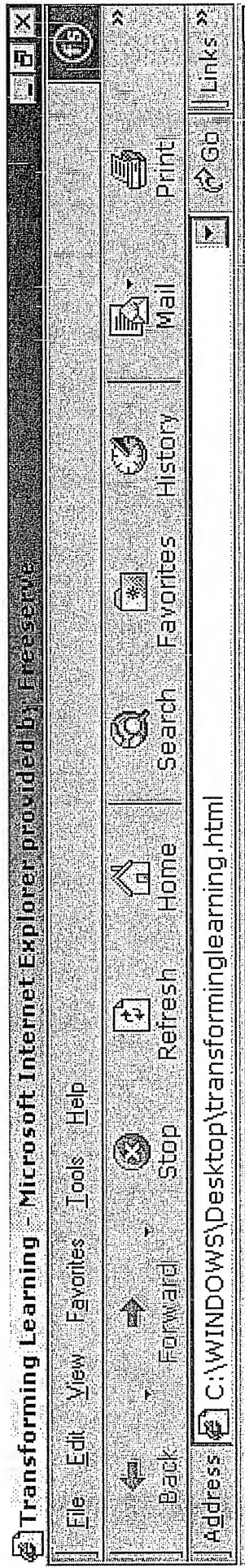
Click on each dimension above to see the comments you have already made. Is there anything else you would like to record now bearing in mind that in your class you are doing something to create a climate which is higher than is typical in other classes.

### **PARTICIPATION**

*Text from previous comments*

*Text from draft action planning points*





## SCOPE FOR IMPROVEMENT:

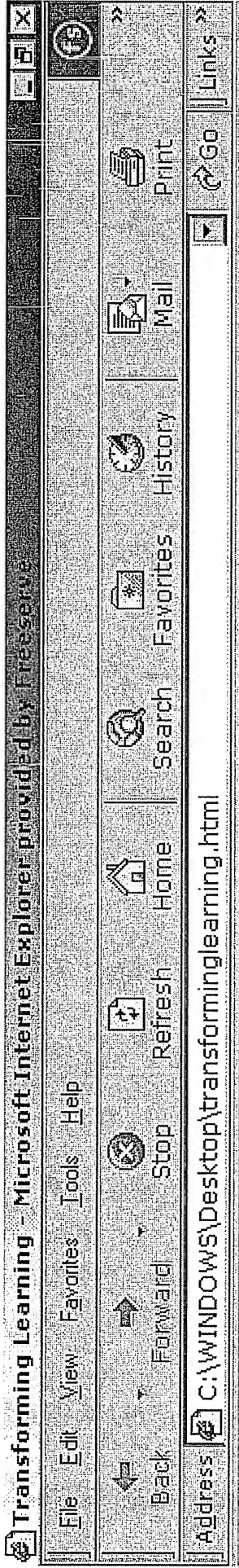
Your students' responses indicate that the climate in your class, on 4 of the 9 dimensions, is lower than that typically experienced by other students in England and Wales:

☐ **FAIRNESS**  
☐ **INTEREST**  
☐ **ENVIRONMENT**  
☐ **STANDARDS**

Click on each of the dimensions above to access some of the comments you have already made on that dimension and to also access some reflective questions to help you pinpoint what might be behind the results and what steps you can take to make a difference.







## FAIRNESS:

### What are your thoughts about this result?

How does this result compare to YOUR perception of how students experience the climate in your class on these dimensions, as shown in the previous charts (see your comments in the box to the right-hand side. You can edit this comments if you wish.)

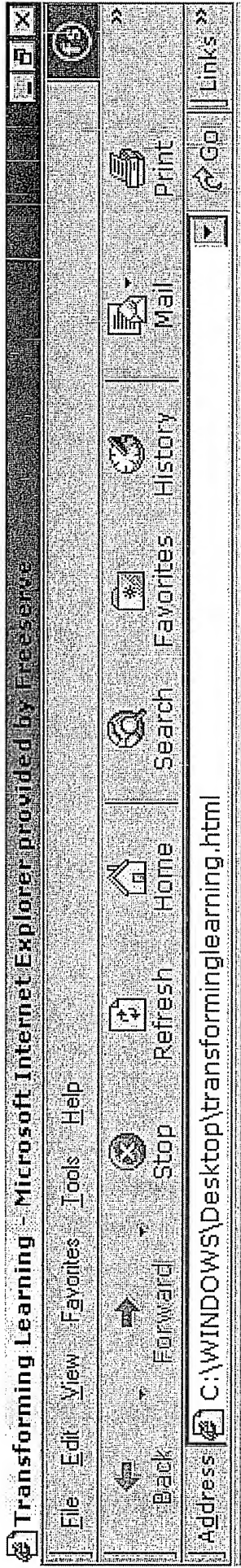
In what ways might your students' views differ now to when they completed the questionnaire?

### FAIRNESS:

*Existing text taken from comments:*

*Existing draft action planning points:*



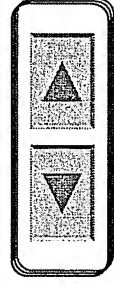


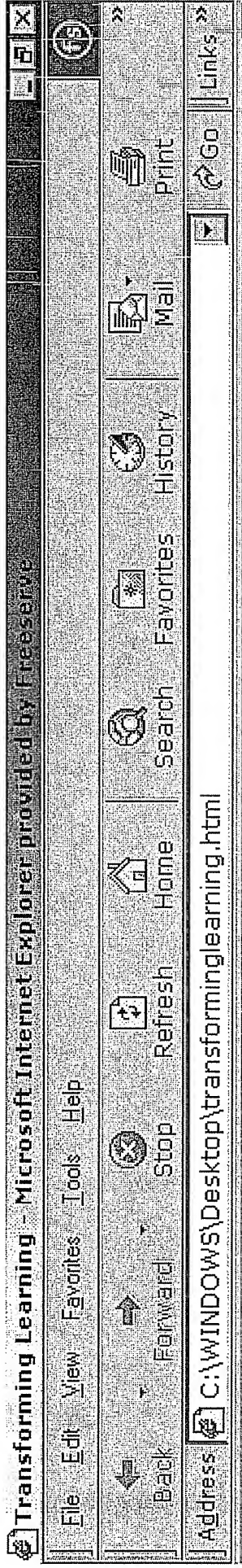
## WHAT HAVE YOU SEEN SO FAR?

This section of the feedback process has allowed to compare your students' current perceptions of the classroom to the current perceptions of **other students** to their classroom.

The data has highlighted how typical your classroom climate is compared to the other classrooms we have surveyed.

You have now looked at your results from a number of different angles and have started to think to yourself about some of the key priority areas for action. The following summary tables indicate which dimensions have come out as strengths and where they have been highlighted as areas for improvement. Before moving on to the next stage of the process, which looks at development and action planning, look at these two charts to gain an overview of your results.





## SUMMARY:

Having seen data of various aspects of your classroom climate, the next part of this site will help you to think through:

- Which dimensions of classroom climate you particularly want to focus on.
- The strengths you want to build upon.
- The changes you want to make.

### ☐ Strengths

### ☐ Areas for Improvement



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Go Links

## SUMMARY OF STRENGTHS:

Dimension	You think your students are satisfied	Your students are satisfied	You are in tune with your students	Your class is higher than is typical in the UK
Clarity				
Order				
Standards				
Fairness				
Participation				
Support				
Safety				
Interest				
Environment				



Done Internet



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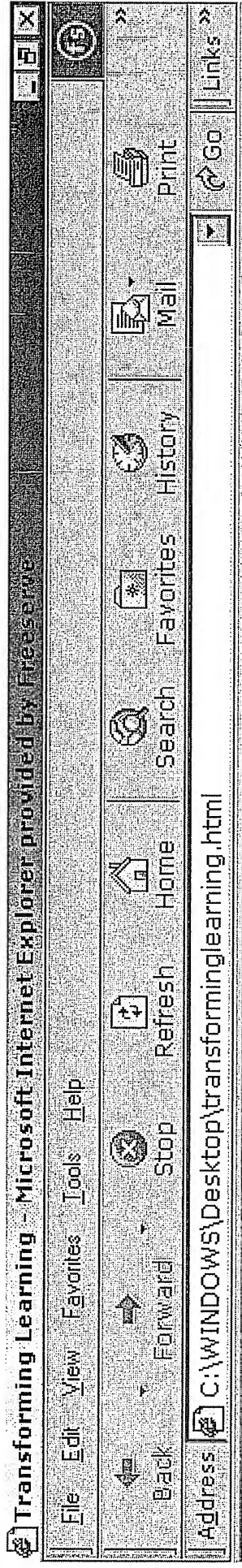
Go Links

## SUMMARY OF AREAS FOR IMPROVEMENT:

Dimension	You feel it is an issue	Your students feel it is an issue	You think your students are more positive than they really are	Your class is lower than is typical in the UK
Classroom				
Order				
Standards				
Fairness				
Participation				
Support				
Safety				
Interests				
Environment				



Done Internet



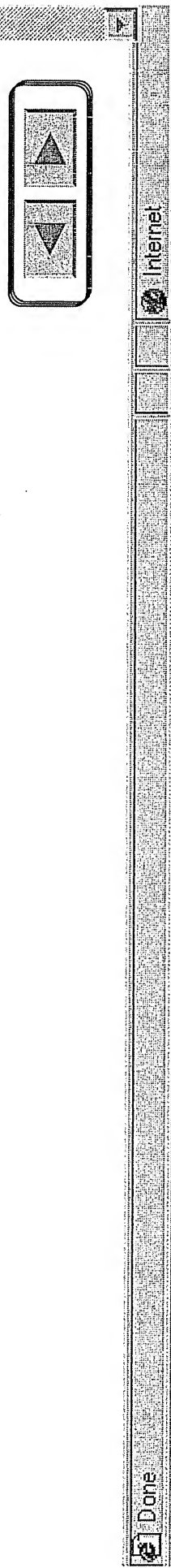
## PLANNING:

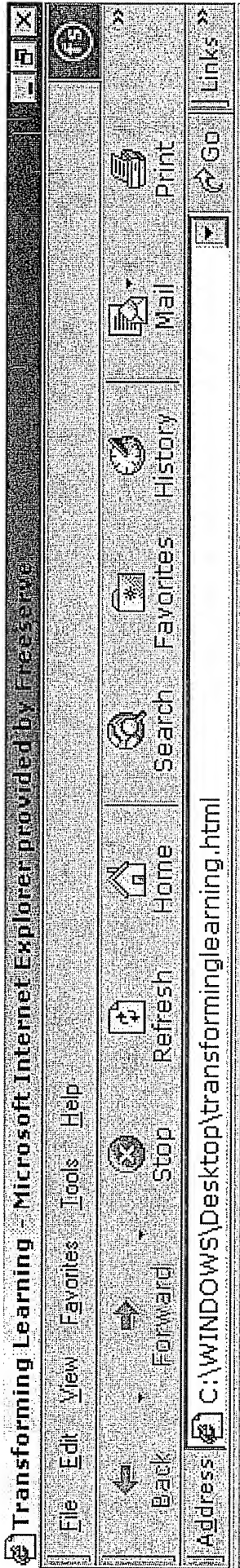
In considering the data and the steps you may wish to take, it is worth bearing the following in mind:

- ♦ Whatever the picture, no matter how much or how little room for development there is, it is not helpful to attempt to change all aspects of classroom at once – it is important and valuable to prioritise.
- ♦ The results you have received are only starting points. This has a number of implications
  - ♦ Student data are a combination of the scores of all your students who completed the questionnaire and so they do not give an indication of the spread of responses
  - ♦ It is valuable to contextualise and reality test the information in relation to your students, your class overall and your school
  - ♦ This data is a snapshot, your classroom climate will be continually changing
  - ♦ Although the data you have seen is a valuable basis for action – and it is hoped that you might wish to use it in this way – it can also be used as a benchmark, from which to measure progress over time
  - ♦ Developing your classroom climate can be as much about building upon current strengths and maintaining positive expectations as it is about making specific improvements

The thinking and reflecting you have been doing as you have worked through the data has encouraged you to consider your overall thoughts as well as your thoughts on individual dimensions. You have also been comparing the data to the examples you provided in the context setting exercise for each dimension, and to the wider school environment.

Whilst the dimensions are important individually, it is also useful to keep in mind how some or all of the dimensions may inter-relate, as well as the 'bigger picture', in considering their combined impact on the overall climate.





## MAKING A START:

Finally, the following thoughts may be helpful when thinking about your next steps.

- ◆ Balance 'quick wins' with longer term goals and prioritise your actions accordingly
- ◆ Be realistic about what can be achieved
- ◆ Think about what your potential impact on the climate might be
- ◆ Think about what else might be having an impact on the classroom climate
- ◆ Consider who you might wish to share some or all of this data with in order to effect change e.g. your students, your colleagues (for advice or support), your head teacher etc - remember that this data is confidential and you have control over who you may wish to show it to. If you wish to share your data, think through how you want to go about this, e.g. you may want to extract the key messages and communicate these in your own way with language that you know others will understand.

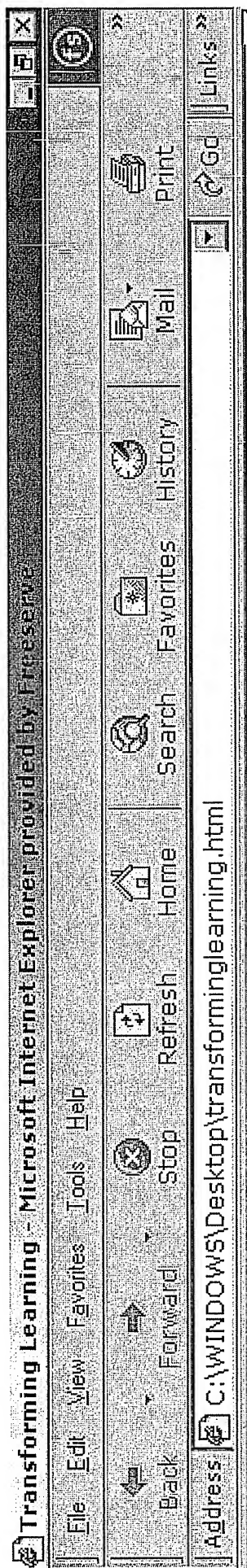
Reflecting on the key points from your data:

- ◆ Look back at the tables summarising your strengths and weaknesses.

Identify the key points that you want to focus on. The following questions may be helpful:

- ◆ Are you surprised by any aspects of your data? Is it what you expected? How does it differ from what you anticipated?
- ◆ What do you see as the strongest points within your classroom climate? What specifically do you think creates a positive experience for your students in these dimensions?
- ◆ What do you see as your data's most challenging points? What do you think are the specific causes of them?
- ◆ What dimensions would you like to improve? Why those dimensions? What are some possible strategies to improve those dimensions?
- ◆ How would you like to enlist your colleagues, your headteacher or your students in your efforts to improve the classroom climate?





## ACTION PLANNING:

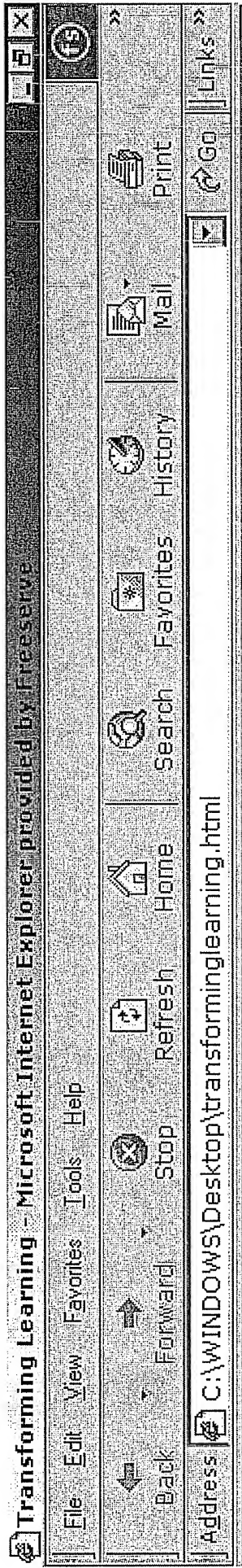
Below you will find for each dimension a series of questions for reflection and ideas for action might be helpful in planning your approach to maintaining or improving your classroom climate:

Click on those you would like to take priority action on:

- ☐ CLARITY
- ☐ ORDER
- ☐ STANDARDS
- ☐ FAIRNESS
- ☐ PARTICIPATION
- ☐ SUPPORT
- ☐ SAFETY
- ☐ INTEREST
- ☐ ENVIRONMENT







# CLARITY:

## **Questions for reflection:**

- Do students have a clear idea of what is expected of them?
- Do students understand how they personally contribute to the class climate, targets for improvement and the ethos of the school?
- Are school policies and procedures clearly articulated and understood?

## **Ideas for action:**

- Ensure that expectations of students are clear
- Communicate how every student can contribute to the ethos and targets of the class and the school
- Make sure that school policies and procedures are clear and understood by all students

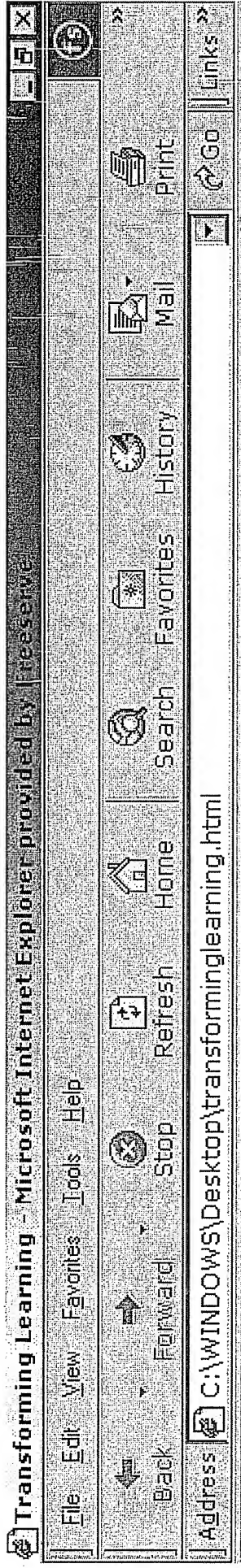
**Clarity** (comments, thoughts, reactions):

**Clarity** (draft action points):

## DEVELOPMENT GUIDE

Click here for more information about the types of behaviours which impact on Clarity to see whether there is anything else you can do to make changes.





# STANDARDS:

## Questions for reflection:

- ♦ Is improving performance emphasised in your class?
- ♦ Are realistic but challenging targets set for students?
- ♦ Are there opportunities for students to participate in individual and class review and target setting at appropriate times?
- ♦ Do students receive information and feedback regarding target accomplishment?

## Ideas for action:

- ♦ At every opportunity emphasis to students the importance of achieving high standards
- ♦ Encourage challenging targets for students
- ♦ Give feedback, information and assistance to improve performance
- ♦ Ensure everyone within the class understands how their learning will be assessed

## DEVELOPMENT GUIDE

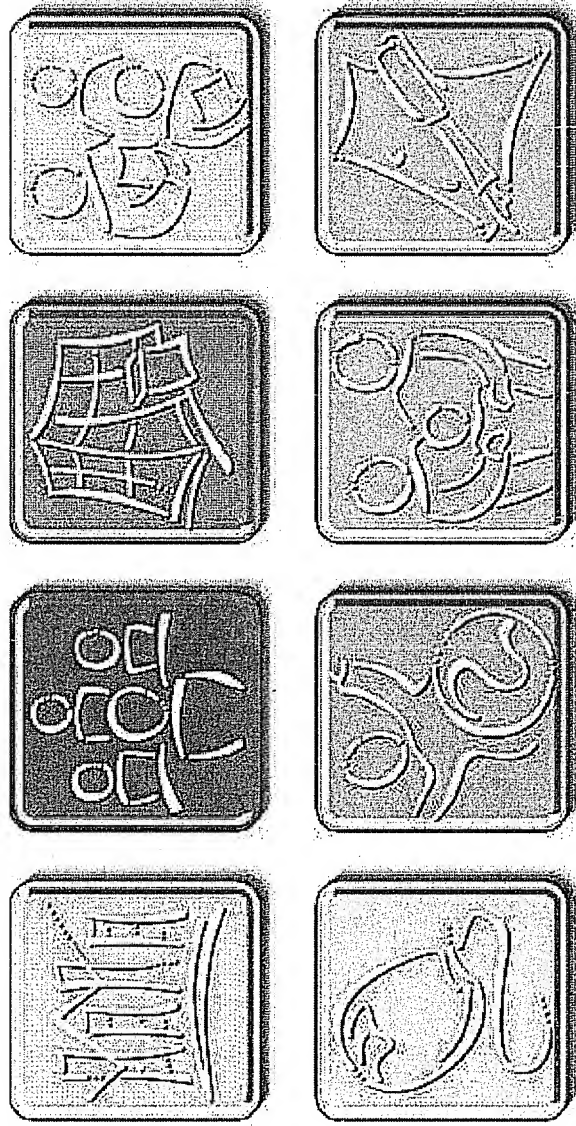
Click here for more information about the types of behaviours which impact on Standards to see whether there is anything else you can do to make changes.



**Standards**  
(comments, thoughts, reactions):

**Standards** (draft action points):





# TRANSFORMING LEARNING

**METHOD AND SYSTEM FOR  
DEVELOPING TEACHING AND  
LEADERSHIP CHARACTERISTICS AND  
SKILLS**

**U.S. Patent Application Serial No.  
10/016,905**

**Filed December 14, 2001**

**Attorney Docket No. D4701-00198**

**Exhibit   K**



Michael Von der Geest/GB/EUROPE/HAYGROUP

01/06/2000 14:01

To Stephen Lams/GB/EUROPE/HAYGROUP@HAYGROUP, Fionnuala  
O'Connor/GB/EUROPE/HAYGROUP@HAYGROUP, Russell  
Hobby/GB/EUROPE/HAYGROUP@HAYGROUP, Katharine  
Nisbet/GB/EUROPE/HAYGROUP@HAYGROUP, Beccy  
Wallace/GB/EUROPE/HAYGROUP@HAYGROUP, Debbie  
Warren/GB/EUROPE/HAYGROUP@HAYGROUP

cc

Subject TLc Project Plan

Dear All,

I have attached for you a copy of the project plan as it stands. When we meet on Monday I would like to discuss filling in the gaps. I will do some more work on it tomorrow, but at least this gives you something to look at.

Regards Michael

To receive People Torque, the Hay Group newsletter, please register at  
<http://peopletorque.haygroup.co.uk>

Links to Hay Group websites: <http://www.haygroup.co.uk>,  
<http://www.transforminglearning.co.uk>, <http://www.haypaynet.com>

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9/14/2007

Draft 1

**PROJECT MANAGEMENT PLAN  
FOR TRANSFORMINGLEARNING.COM  
START UP**

**Distribution:** Project Team  
Business Steering Group

**Date:**

**File Reference:**

**Cover + 36**

## **AUTHORISATION PAGE**

**Produced by**                      **Michael Von der Geest**

**Title**                                      Project Manager

**Signature**

**Date**

**Quality Assured by**              **Fionnuala O’Conor**

**Title**                                      Project Director

**Signature**

**Date**

**Approved by**                      **Frank Hartle**

**Title**                                      Education Business Director

**Signature**

**Date**

## RECORD OF CHANGES

This is a controlled document.

Additional copies should be obtained through TransformingLearning.com. a division of Hay Management Consultants

In the event of copying locally each document shall be marked 'Uncontrolled Copy'.

Full issues and page amendments shall be identified on this page.

Proposals for change should be forwarded in writing to the project manager of TranformingLearning.com

Version	Date	Details of Change



## **CONTENTS PAGE**

### **TRANSFORMINGLEARNING.COM START UP**

- 1. GENERAL**
- 2. BACKGROUND**
- 3. BUSINESS NEED**
- 4. OBJECTIVES**
- 5. PROJECT EXECUTION STRATEGY AND PLANS**
- 6. PROJECT ORGANISATION**
- 7. PROJECT CONTROL AND ADMINISTRATION SYSTEMS**
- 8. RISK ASSESSMENT**
- 9. ANNEX A PROJECT PROGRAMME**
- 10. ANNEX B PROJECT BUDGET**
- 11. ANNEX C DELIVERABLES CHART**
- 12. ANNEX D PROGRESS REPORT**
- 13. ANNEX E PROJECT REVIEW**
- 14. ANNEX F – PROJECT ARSENAL FILING LIST**

## **1. General**

### **1.1 Purpose**

The project management plan is the principal tool, which shall be utilised by the project team in the planning, management and control of the project. It forms the agreed baseline against which the project shall be monitored by the Hay management team and the steering group. The plan defines the requirements of the project, the list of deliverables, the execution strategy, and the agreed controls that shall be administered by the project manager.

The plan has been developed from the Business plan which has been presented to the steering group. This project plan seeks to provide an operational focus to the start up phase of TransformingLearning.com.

### **1.2 Responsibilities for the Management Plan**

The project manager is responsible for the production, amendment and issue of the project plan.

## **2. Background**

HayMcBer has built up a dominant position as the provider of genuinely transformational solutions in the education market. LPSH has set a global standard for leadership interventions and our ground-breaking research for the DfEE into Headteacher and Teacher effectiveness has established us at the forefront of educational innovation. Our brand stands for quality, practicality and innovation; and soon we hope to be recognised throughout the education community. The English Primary and Secondary Education market represents an immediate and substantial opportunity for HayMcBer.

Hay UK has set an ambitious agenda for growth and established a vision for 2004. This vision goes beyond exploiting existing business opportunities to taking bold entrepreneurial action to produce dramatic returns on the back of our core organisational competencies. The challenge now is making that vision a reality. Bold, symbolic steps taken in the short term will demonstrate commitment to the vision and ensure that individuals are not demotivated or disillusioned.

TransformingLearning.com is such a step, one which can energise the wider organisation and show that the 2004 agenda is not only realistic but being aggressively realised.

The aim of TransformingLearning.com (TLc) is to transform British schools by supporting Heads, teachers and pupils themselves in engendering leadership at all levels throughout the school and achieving dramatic and sustainable change in pupil progress.

### **3. Business Need**

The business need for TLc is described in more detail within the business plan. Within the context of the start up phase the project must satisfy the needs of two aligned customers. The primary customer is Hay Management Consultants Ltd. The business will need to see the development of a viable, functioning business division within Hay UK. The division will have managed successfully the start up phase including a sufficient order book to satisfy the business plan.

The secondary customer is English schools sector. Their need in the start up period will be met if they recognise the value offered by the TLc product and services to their educational institutions.

### **4. Objectives**

This project plan has been developed to construct a fully functioning internet based school transformation offering. This will consist of

- Self and other-completed diagnostics
- Context exploration process
- Interactive personalised feedback on findings
- Targeted development advice integrating all sources of data
- Support in action-planning and following through
- On-going record of feedback and development advice

#### **4.1 Deliverables**

The key deliverables of the project can be sub divided into five areas which will allow the project team to successfully deliver the project objective

1. Application design
2. Application development
3. Client documentation
4. Agreed business construct
5. Sales & marketing plan

A further breakdown of the key deliverables is given in section 5.1.

#### **4.2 Assumptions**

The following assumptions have been made in the production of this project plan:

Hay Management has agreed to the development of TLc through the acceptance of the overall business plan.

Sufficient resources and funding will be allocated to the start up in line with the forecasts given within the business plan.

#### **4.3 Constraints**

The major constraints on the project are timescale and effective communication and decision making. The start up phase of the business opportunity is critical to the success of the business overall.

There is a need to deliver the project to the tight timescales described within this project plan, to this end achieving the project timescales is critical.

With the number of stakeholders who will need to be involved within the project it is important that effective communication and decision making protocols are established.

Other technical constraints such as the capability of in school hardware are discussed within the risks section of this plan.

#### **4.4 Scope of Work**

The project will involve a team of consultants within Hay. The project will have an impact on the education sector business within the UK. After the start up phase of the project the scope of the business may expand into other sectors.

#### **4.5 Timescale and Cost**

The project team began to be constructed in April 2000. The start up period to which this project plan relates has already commenced. It is scheduled for completion by the end of January. A detailed programme is included in section 5.

The total project budget is £ (see section 5.5 & Annex B) sub divided into £ of project team costs and of external costs predominantly external development consultants.

#### **4.6 Success Criteria**

The start up period will be seen as a success if the deliverables are achieved within the accepted timescales and the business order book meets the first quarter sales targets.



## **5. PROJECT EXECUTION STRATEGY AND PLANS**

The project execution strategy and plans have been sub-divided into:

- 5.1 Work Breakdown Structure (WBS)**
- 5.2 Programme**
- 5.3 Project Budget**
- 5.4 Resource Plan**
- 5.5 Deliverables Chart**

This commences with the WBS, which is shown on the next page.

## 5.1 Work Breakdown Structure

## 5.2 Programme

The programme for the project has been developed from the Work Breakdown Structure on the previous page. The schedule has been produced in the form of a Gantt Chart on MS Project 98, project management software tool. The programme has been taken to level 4 milestones to ensure that the resource and cost plans can be developed. The schedule forms Annex A of this plan.

## 5.3 Project Budget

An outline budget is detailed below. The build up of the budget is shown in Annex B.

Element	Total Budget
Project Team	
Product Development Costs	
Sales & Marketing	
Legal & Professional fees	
Transport & Travel	
Recruitment	
Miscellaneous	
<b>TOTAL</b>	

## 5.4 Resource Plan

The resource plan for this project divides into two types, internal and external. The first is resources from within Hay UK. External resources will also be required to undertake specific project tasks.

The core project team will consist of the following:

Project Sponsor	Frank Hartle
Project Director	Fionnuala O'Connor
Project Manager	Michael Von der Geest
Project Seceretary	Debbie Warren
Application Design Package Manager	Catherine Nisbet
Application Development Package Manager	Steve Lams
Client Information Package Manger	Beccy Wallace
Sales & Marketing	Russell Hobby

## 5.5 Deliverables Chart

The Deliverables chart for this project is contained at Annex C of this plan. It will be the primary document used in progress reporting.

## **6. PROJECT ORGANISATION**



## **6.1 Roles and Responsibilities**

The roles and responsibilities of the project groups and project team members are described below.

### **6.1.1 Transforming Learning .com Steering Group**

The steering group will meet at monthly intervals throughout the project and will review the overall strategy of the project. They will review the overall project progress and discuss individual package issues as necessary. . It will act as the primary control group for the project (see section 7 Project Control Cycle). The steering group will also provide the forum for requests for changes or additional information from the project manager. The steering group will consist of the following members:

#### **6.1.2 TLc Core Project Team**

The Core Project Teams' roles are described below:

##### **Project Sponsor**

- Primary interface with Hay Executive groups
- Coach to Project Director
- Authorisation of the project management plan
- Ultimate accountability for project budget

##### **Project Director**

- Reporting on project progress to the steering group
- Allocation and control/monitoring of Project Budget
- Overview of project progress
- Authorisation of the project management plan

##### **Project Manager**

The project manager is responsible for the successful execution of the project in particular:

- Ensuring a viable project management plan is produced, maintained and achieved
- Reporting on the financial and technical progress of the project at intervals specified in the project management plan
- Ensuring effective communication on the project
- Managing the resources allocated to the project
- Managing the project risks and raising any difficulties outside the project scope to the project director or steering group
- The project manager will be accountable to the steering group

### **Package Manger**

- Full responsibility for the successful delivery of the assigned package within the project.
- Responsibility for overall knowledge of the package
- To ensure that all key dates within the project programme are identified and achieved
- Co-ordination of all meetings with key individuals on the package
- Involvement of others from the project team as and when necessary
- Reporting at two weekly project meetings
- Providing package reports to the project manager for project meetings
- Ensuring that all areas of concern with the package are highlighted to the project team
- Providing assistance/attending meetings as and when requested by other package managers
- Liaison with business coach allocated to support package manager

## **7. PROJECT CONTROL AND ADMINISTRATION SYSTEMS**

### **7.1 Project Management Plan Review**

The project management plan will be peer reviewed initially, and then quality assured and signed by Fionnuala O'Connor and Frank Hartle.

Records of these reviews and sign ups will be recorded in the Project Tlc Start Up Filing System (file ref. ), and any changes recorded on the Record of Changes on page ii of this plan.

### **7.2 Progress Reporting**

The core project team will review project progress at two weekly intervals through the review of the project progress report. Each package manager will produce a report for the project meeting. Production and distribution of project reports will be the responsibility of the package manager. A sample report is attached in Annex D. The report will review progress against the following:

- Package progress
- Deliverable review
- Financial review
- Areas of concern

At monthly intervals the steering group will meet to review overall project progress. The project manager will be responsible for producing an overall project report. The report will follow the format of the project team meetings.

The monthly timetable for progress reporting will be as follows:

Tuesday	Project team meeting, presentation of package managers reports to Project Manager
Friday	Presentation of progress report to steering group by Project Manager & Project Director

### **7.3 Financial Control**

The steering group will compare project costs and forecasts with the initial budget at monthly intervals (see Annex B). Any changes to budget will be agreed by the group and recorded in the meeting minutes. The changes will be recorded in the project management plan and updated financial statements.

### **7.4 Reporting Problems and Change Control**

All problems relating to the project, identified by any internal or external source will be analysed and subjected to corrective action as appropriate. Any

changes to the deliverables or programme will be discussed by the steering group and recorded in the meeting minutes, if defined as significant these changes will result in the change and re-issue of the Project Management Plan.

If the steering group agrees minor changes then updated programmes will be issued and attached to the project management plan.

### **7.5 Validation of Project Deliveries**

Validation of application solutions and management processes produced within the scope of this project will be subject to confirmation. The mechanism for validation is a formal review and sign off. This will take place for all main deliverables stated in section 5.5 Deliverables Chart. The Project Sponsor and Project Director will undertake the review and sign off. The sign off will be recorded on a standard project review pro-forma (see Annex E).

At the conclusion of the project a formal project review will be held attended by the project team and steering group. At this review all tasks on the work breakdown structure will be signed off. This will record the successful conclusion of the project.

### **7.6 Project Quality Requirements**

The importance of adequate quality management during the execution of this project has been recognised throughout the project management plan. In addition the specific issue of quality records is addressed below.

The following records will be maintained in hard copy format by the project manager under file reference:

- Project Management plan, plus supporting documents
- Project Management plan Review
- Agreed changes to the document
- Validation review records
- Observation/problem and corrective action report

### **7.7 Filing Systems**

The paper and electronic filing system, which has been initiated for this project is controlled and owned by the project manager. The filing list may be found at Annex F.





## 8. Risk Assessment

Risk will be managed in accordance with IWS risk management procedures. Responsibility for management of the risk on each task will lie with the project manager.

RISK ASSESSMENT						
Category	Risk Description	Prob'y	Impact	Action to mitigate	Contingency plan	
					Description	Responsibilit y
Categories PM = Project Management Risk TR = Technical Risk CR = Commercial Risk ER = External Risk Probability (Prob'y) - H - High M – Medium L - Low Impact - H - High M – Medium L - Low						

## **9. ANNEX A Project Programme**

## **10. ANNEX B Project Budget**

## **11. Annex C Deliverables Chart**

## **12. Annex D Progress Report**



### 13. Annex E Project Review

#### Standard Project Review Proforma

<b>PROJECT:</b>	Project Tlc Start Up
<b>PROJECT MANAGER:</b>	
<b>DATE:</b>	
<b>Product to be signed off:</b>	
<b>Deliverable linked to: (refer to WBS)</b>	
<b>Description of Product</b>	
<b>SIGNATORIES</b>	
Project Manager	
Project Director	
Project Sponsor	
File Ref:	

## 14. Annex F – Project Arsenal Filing List

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